

DRGR Performance Report Sample with Performance Report Business Guide/Requirements Overlay

This sample performance report shows the financial & narrative input/input optional screens with content and overlays the requirements and performance report questions found in the [Performance Reporting Guide](#). This should be used as an example only. TA Providers are required to submit the necessary volume and detail as needed to support the progress of the quarter for each award, work plan, and task. In some cases, minimal or no reporting may occur, while on other awards, the volume and detail may greatly exceed the example.

The performance report is organized in two parts:

- [Award-Level Performance Report](#)
- [Work Plan Level Performance Report](#)

The sample below follows the flow of inputs in DRGR starting with award-level financial reporting (SF-425), then award-level narrative, then work plan and task narrative inputs.

Award-Level Performance Report



Manage Performance Report

Review award-level financials and compare to your financial system records. Differences/issues should be noted in the SF425 Comments & submission comments.

Financials

Details

Narratives

Documents

Measures

Activities

History

Upload

Financials

NOTE: Although the performance period is 04/01/2021 to 06/30/2021, this report is displaying changes made to the Action Plan (such as changes to project/activities) after the performance period.

Overall Progress Metrics

Overall	This Report Period	To Date
Total Projected Budget From All Sources	\$63,609.16	\$6,411,884.24
Total Budget	\$63,609.16	\$6,411,884.24
Total Obligated	\$659,963.52	\$10,855,969.55
Total Funds Drawn	\$60,431.11	\$6,080,145.50
Program Funds Drawn	\$60,431.11	\$6,080,145.50
Program Income Drawn	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$0.00	\$6,021,756.40
Most Impacted and Distressed Expended	\$0.00	\$0.00
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00

Funds Expended

Overall	This Report Period	To Date
ABC Inc.	\$0.00	\$6,021,756.40

Other Funds

No Results Found

Review Funds Expended, Project Funds-To Date and This Report period and compare to your financial system records. Differences/issues should be noted in the SF425 Comments & submission comments and addressed with your GTR.

Project Funds—To Date

Project Number	Project Title	Project Budget	Activity Budgets	Activity Obligatons	Program Funds Drawn	Program Income Drawn	Total Drawn
9999	Restricted Balance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Administration	CPD, Housing, Public Housing, Fair Housing, CC	\$645,000.00	\$645,000.00	\$645,000.00	\$643,591.01	\$0.00	\$643,591.01
CPD	CPD	\$1,870,000.00	\$1,867,099.71	\$3,452,672.12	\$1,850,642.18	\$0.00	\$1,850,642.18
Choice N/hoods	Public Housing	\$425,000.00	\$424,921.16	\$426,464.23	\$424,921.16	\$0.00	\$424,921.16
Coordination	CPD, Housing, Public Housing, Fair Housing, CC	\$322,500.00	\$322,500.00	\$322,500.00	\$321,333.46	\$0.00	\$321,333.46
Energy	Cross-Cutting	\$595,000.00	\$594,827.72	\$1,347,504.23	\$594,827.72	\$0.00	\$594,827.72
Fair Housing	Fair Housing	\$42,500.00	\$40,603.29	\$121,979.32	\$40,603.29	\$0.00	\$40,603.29
HOPE VI	Public Housing	\$361,250.00	\$329,434.00	\$329,434.00	\$16,728.32	\$0.00	\$16,728.32
Housing Counseling	Housing	\$425,000.00	\$424,920.13	\$725,511.01	\$424,920.13	\$0.00	\$424,920.13
Knowledge Mngmt/HUDX	Cross-Cutting	\$1,700,000.00	\$1,699,338.70	\$3,399,338.70	\$1,699,338.70	\$0.00	\$1,699,338.70
RAD/Housing Preservation	Housing	\$63,750.00	\$63,239.53	\$85,565.94	\$63,239.53	\$0.00	\$63,239.53
Total		\$6,450,000.00	\$6,411,884.24	\$10,855,969.55	\$6,080,145.50	\$0.00	\$6,080,145.50

Project Funds—This Report Period

Project Number	Project Title	Project Budget	Activity Budgets	Activity Obligatons	Program Funds Drawn	Program Income Drawn	Total Drawn
CPD	CPD	\$0.00	\$3,866.77	\$600,221.13	\$42,091.16	\$0.00	\$42,091.16
Coordination	CPD, Housing, Public Housing, Fair Housing, CC	\$0.00	\$0.00	\$0.00	\$1,611.63	\$0.00	\$1,611.63
Energy	Cross-Cutting	\$0.00	-\$65.63	-\$65.63	\$0.00	\$0.00	\$0.00
Fair Housing	Fair Housing	\$0.00	-\$165.98	-\$165.98	\$0.00	\$0.00	\$0.00
HOPE VI	Public Housing	\$0.00	\$59,974.00	\$59,974.00	\$16,728.32	\$0.00	\$16,728.32
Total		\$0.00	\$63,609.16	\$659,963.52	\$60,431.11	\$0.00	\$60,431.11

Financials	Details	Narratives	Documents	Measures	Activities	History
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SF-425: Federal Cash

Metrics Name	Metrics Value	Adjusted Value
10a: Cash Receipts	\$60,431.11	
10b: Cash Disbursements	\$60,431.11	\$0.00
10c: Cash on Hand	\$0	\$0.00

[Edit](#)

Adjust values if receipts & disbursements do not match your financial system. Explain adjustments in SF-425 Comments.

SF-425 Comments

For this quarter our cash disbursements equaled cash receipts. There were no delays in payments resulting in no cash on hand.



Additional Matching Funds

Matching Funds (not related to any activities): \$0.00



Matching Funds Comments: (For awards with match or leverage, be sure to complete this section with applicable values and comments describing the leverage funds.)

For awards w/
leverage: i.e.
Distressed Cities

Progress Narratives

* Overall Progress Narrative

For quality Overall Progress Narratives, review and respond to questions 2,3,9 &10 from the Guide for Performance Reporting

Progress on implementation: Progress overall is going according to plan and expectations. We have 11 active work plans for this award this quarter and we completed TA on 5 others and closed them after initiating surveys.

[Edit](#)

Work on several direct TA work plans on this award has been impacted by the widespread mid-west flooding disaster. ABC Inc. has been in touch with TA recipients regarding their availability and have informed our HUD program contacts and GTR. To address this barrier, we have submitted work plan amendments with modified timeframes and adjusted modalities to accommodate the needed TA.

This award was extended for 1 year this quarter and is the last possible extension for the award. We are projecting spending 100% of the award before close out next year.

Work is progressing well on this award as we near the end of the award. Highlights for progress on the award include: 1) Cross-Cutting Energy: completed 4 products and tools for grantees and conducted 5 webinars, 2) Fair Housing: conducted 3 webinars on special topics and completed 3 new tools for the NFHTA tool kit, and 3) Housing Counseling: coordinated with FEMA and HUD disaster staff and completed 1 of 3 planned tools for housing in disaster.

Management and administrative issues: Some work on the XYZ HUD project has been delayed. We are experiencing some delays in program decisions that have impacted work plan timelines and deliverables. We have held meetings with program staff and the GTR to discuss impacts of delays. We will address the outcomes of this on the next performance report.

Lessons learned: ABC Inc.'s experience this past quarter managing impacts associated with the flooding disaster has demonstrated the necessity to be able to pivot on TA and involve all key players from HUD HQ, Field Offices, and within the recipient's organization, to figure out next steps to deliver the needed TA.

Addressing previous HUD feedback: ABC Inc. has addressed prior quarter HUD performance report comments on late subcontracting invoicing across several work plans on this award. To address this, we have updated our internal standard template for agreements to clarify and highlight prompt invoicing and provided a training session to subcontractors on expectations and requirements.

Planned activities for next reporting period: Next quarter, ABC Inc. will initiate an administrative review of work plans to plan for needed POP extensions and work plan close out. ABC Inc. will also begin a financial review and documentation process to submit for an indirect cost rate adjustment. ABC Inc. also plans to submit our annual labor rate adjustments in DRGR including high wage rates for staff and consultants.

ABC Inc. will finish work on several projects on this award including Cross-Cutting Energy activities, Fair Housing, and Housing Counseling. We expected to finish work on the remaining projects in the quarter following.

Financials	Details	Narratives	Documents	Measures	Activities	History	Upload
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Supporting Documents 0

The file size limit is 3MB. Valid file extensions are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .pptx, and .pdf.

[+ Add Document](#)

No results found.

Review and respond to question 11 from the Guide for Performance Reporting. Attach any key award level documents and emails.

Performance Measures

Filter By Projects

Filter By Grantee Program

Outputs

Performance Measure	Proposed	Projected	This Report Period	To Date
# Webinars provided	0	10	0	5
# hours	0	2,103	45	45
# of Non-business Organizations benefitting	0	10	40	40
# of People Trained	0	100	37	37
#On call TA cases completed	0	10	0	0
Number of new visitors attracted	0	10	0	0

This is a summary view of all performance measures for the award by measure. Shows projected, actuals (This Report Period inputs at the Work Plan level) and To Date totals. Edits for Measures at the Work Plan level will be reflected here.



Manage Performance Report—Activity

Financials

Narratives

Documents

Measures

Outcomes

Overall

Overall	This Report Period	To Date
Total Projected Budget From All Sources	\$20,000.00	\$20,000.00
Total Budget	\$20,000.00	\$20,000.00
Total Obligated	\$20,000.00	\$20,000.00
Total Funds Drawn	\$0.00	\$0.00
Program Funds Drawn	\$0.00	\$0.00
Program Income Drawn	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$0.00	\$0.00
HUD identified Most Impacted and Distressed Expended	\$0.00	\$0.00
Other Funds	\$0.00	\$0.00
Match Funds	\$0.00	\$0.00
Non-Match Funds	\$0.00	\$0.00

Funds Expended

Overall	This Report Period	To Date
ABC Inc.	\$0.00	\$0.00

 Edit

Review work plan level overall financials and

Narratives

Work Plan Progress

For quality Work Plan Progress narratives, review and respond to questions 1,3,4,5,7,8,9,10 from the Guide for Performance Reporting.

Progress on implementation: It is expected that work on this work plan will be complete within 60 days and that the next quarterly report will be the last for this work plan. There have been no changes to the work plan tracking plan since the modifications reported last quarter. ABC Inc. submitted a work plan period of performance extension to complete the assigned TA and to deliver an updated FAQ document to address recent field changes to the input screen for HUD Inform. The extension was approved by HUD.

[Edit](#)

Management and administrative issues: While it was a challenge to maintain sufficient staff with the requisite skills and program knowledge for the technical aspects of this work plan, we have been fully staffed this quarter and are delivering according to the revised schedule.

Lessons learned: From a management perspective, ABC Inc. had difficulty maintaining some key technical staff positions for this work plan which resulted in some early delays in progress. To address, ABC Inc. has entered into teaming agreements with other entities for increased depth.

Addressing previous HUD feedback: See Task 1 and Task 2 inputs.

Planned activities for next reporting period: See Task 1 and Task 2 inputs.

Financials	Narratives	Documents	Measures	Outcomes
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Task Progress

Task 1: Task 1: WP Development and Management

Start/End Date:
06/04/2021 -
06/30/2021

Estimated Hours:
18

Estimated Cost:
\$2,706.00

Status:
In
Progress

TASK DESCRIPTION:

This task includes: a) Work Plan development and revisions (including discussions with HUD HQ and other applicable parties) b) Team oversight and coordination, including subcontractor oversight where necessary c) Financial oversight and tracking of costs and budget including subcontractor invoice review and approval d) Necessary communication with all key parties and problem solving e) Providing monthly narratives on work performed and other invoicing requirements documents f) Record keeping (e.g., deliverables) and close out documentation, as required. g) Updating personnel, as required by HUD's Work Plan Standard Operation Procedures.

TASK PROGRESS:

Progress on implementation: ABC Inc. provided financial oversight for the work plan and reviewed records and timesheets for 3 voucher submissions. ABC Inc. tracked expenditures and progress throughout the quarter.

Management and administrative issues: ABC Inc. updated 2 subcontractor agreements and followed up with XYZ subcontractor on late invoicing/payment requests.

Lessons learned: None to report at this time for this task.

Addressing previous HUD feedback: ABC Inc. acknowledges HUD feedback regarding late invoicing from subcontractors. This issue is resolved and training was provided to mitigate. Invoicing and billing are now up to date.

Planned activities for next reporting period:

ABC Inc. will provide financial oversight for the work plan and review records and timesheets for voucher submission and will continue to track progress and barriers.



For quality Task Progress narratives, review and respond to questions 1,3,4,5,7,8,9,10 from the Guide for Performance Reporting.

Task 2: Task 2: TTA to Implementation Grantees

Start/End Date:
06/04/2021 -
06/30/2021

Estimated Hours:
175

Estimated Cost:
\$17,294.00

Status:
In
Progress

TASK DESCRIPTION:

The following activities will be accomplished for this task and are listed in priority order: Technical Assistance: ABC Inc. will provide technical assistance to grantees and HUD to answer questions and resolve any issues they may encounter using HUD Inform. Each grantee has a designated ABC Inc. point of contact that s/he can reach out to with questions and concerns at any time. After data is entered, the ABC Inc. POC will hold a meeting for each grantee (including assigned HUD and grantee staff) to review and validate their quarterly data and facilitate the completion of follow-up action items and report submission and approval. Metric and Report Reviews: Upon HUD request ABC Inc. will make recommendations for how metrics can be changed, updated, added or deleted. Data Analysis: ABC Inc. will conduct comprehensive reviews of the data entered to determine what is missing data and what is inaccurate data. This analysis will be done at both the grantee level and the program level and will also analyze trends, identify anomalies, and research those to understand causes and corrective action if needed. Metric Data Upload in HUD Inform: ABC Inc. will upload the appropriate data metrics for HUD collected metrics on a quarterly and an annual basis for each grantee. ABC Inc. will also collect and upload appropriate data inputs for ABC Inc. collected metrics on an annual basis. Guidebook and Data Dictionary: ABC Inc. will develop and distribute periodic updates to HUD Inform User Guidebook and Data Dictionary documents as changes and additional functionality features are added to HUD Inform. FAQs: ABC Inc. will develop and distribute periodic updates to the Frequently Asked Questions document as questions arise from grantees and additional functionality features are added to the system.

TASK PROGRESS:

Progress on implementation: ABC Inc. has completed 3 deliverables this quarter 1) the finalized guidebook with new attachments addressing grantee needs, 2) the updated data dictionary addressing the HUD's last comments on input screens, and 3) the last assessment of grantee data entries. All 3 deliverables were sent to HUD GTR/GTM/POTAC contacts. TA recipients have reported that the new format of the user guide was helpful, and that the updated/clarified data definitions were key to their understanding of what data goes where and why. The tools appear to be having a direct impact on the grantee performance as the quality of the data entries has increased significantly.

Management and administrative issues: ABC Inc. staff attended meetings with HUD staff to discuss the needed work plan extension and to gather final requirements for the last FAQ deliverable.

Lessons learned: ABC Inc. observed that a custom approach to TA recipient engagement was valuable given the breadth of TA recipients and differences in demographics.

Addressing previous HUD feedback: ABC Inc. appreciates the feedback on the demonstrated increase in TA recipient data inputs and agree that sustainment is key to program success.

Planned activities for next reporting period: ABC Inc. staff will engage HUD staff on the final FAQ deliverable for input, then complete the product and present to HUD upon completion. The expectation is that the FAQ document will be delivered early next quarter.

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For quality Task Progress narratives, review and respond to questions 1,3,4,5,7,8,9,10 from the Guide for Performance Reporting.

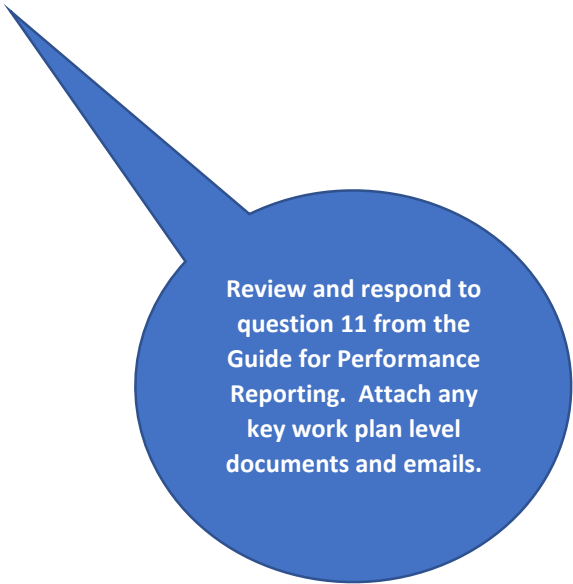
Financials	Narratives	Documents	Measures	Outcomes
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Supporting Documents 0

The file size limit is 3MB. Valid file extensions are: .png, .gif, .jpg, .jpeg, .doc, .docx, .xls, .xlsx, .csv, .ppt, .pptx, and .pdf.

[+ Add Document](#)

No results found.



Review and respond to question 11 from the Guide for Performance Reporting. Attach any key work plan level documents and emails.

Financials	Narratives	Documents	Measures	Outcomes
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 Edit

HUD Defined Outputs

Performance Measure	Projected	This Report Period	To Date
# hours	175	45	45
# of Non-business Organizations benefitting	10	40	40
# of People Trained	100	37	37

Review and respond to question 5 from the Guide for Performance Reporting. What progress have you made with regarding to HUD defined measures?

Financials	Narratives	Documents	Measures	Outcomes
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Outcomes

Task 1: WP Development and Management

▸ Not Applicable HUD Outcome Category

Task 2: TTA to Implementation Grantees

▾ HUD Outcome Category #1: Improved capacity to develop plans and priorities informed by community needs and program/policy goals

1A: Improved capacity to collect, analyze, and share data (e.g., improved data on populations served, program results or impacts, or community conditions)

ACTION PLAN DESCRIPTION:

Improved grantee understanding of the information that is being requested and analyzed by HUD and increased accuracy of the reporting of data through HUD Inform.

PERFORMANCE REPORT PROGRESS:

Based on ongoing TA and continued contact, the TA recipients are demonstrating an increased capacity to enter accurate and quality data into the HUD Inform system. There are fewer reported errors and the overall quality of report outputs have increased for the program. TA recipients are utilizing the FAQs and the guidebook and data dictionary to improve their system inputs and the number of questions asked is down significantly. We believe the TA and the tools provided will be sufficient and sustained quality inputs from the TA recipients are likely moving forward. TA surveys for this direct TA engagement will be initiated in DRGR after the final FAQ document is complete.

Review and respond to questions 2 and 6 from the Guide for Performance Reporting. What are the results of TA? What capacity gained?

